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Bib Data Sheet

CONFIRMATION NO. 6492

SERIAL NUMBER 10/091,046	FILING DATE 03/05/2002 RULE	CLASS 705	GROUP ART UNIT 2161	ATTORNEY DOCKET NO. P6340 (301101-000009)
APPLICANTS Peng Chen, Elmhurst, IL; Roger Ibbotson, Hamden, CT; Michael C. Henkel, Evanston, IL;				
** CONTINUING DATA ***** ** FOREIGN APPLICATIONS *****				
IF REQUIRED, FOREIGN FILING LICENSE GRANTED** SMALL ENTITY ** ** 03/27/2002				
Foreign Priority claimed <input type="checkbox"/> yes <input checked="" type="checkbox"/> no 35 USC 119 (a-d) conditions met <input type="checkbox"/> yes <input checked="" type="checkbox"/> no <input type="checkbox"/> Met after Allowance Verified and Acknowledged <i>N. Abraham</i> Examiner's Signature Initials		STATE OR COUNTRY IL	SHEETS DRAWING 7	TOTAL CLAIMS 63
				INDEPENDENT CLAIMS 9
ADDRESS Jefferson Perkins Piper Marbury Rudnick & Wolfe P.O. Box 64807 Chicago, IL 60440-0807				
TITLE Automatically allocating and rebalancing discretionary portfolios				
FILING FEE RECEIVED 1009	FEES: Authority has been given in Paper No. _____ to charge/credit DEPOSIT ACCOUNT No. _____ for following:		<input type="checkbox"/> All Fees <input type="checkbox"/> 1.16 Fees (Filing) <input type="checkbox"/> 1.17 Fees (Processing Ext. of time) <input type="checkbox"/> 1.18 Fees (Issue) <input type="checkbox"/> Other _____ <input type="checkbox"/> Credit	